Country overview

Afghanistan has a little over thirteen percent of its population connected to the internet. The penetration of mobile internet is 18.0%, and fixed broadband penetration stands at 0.05%.

Dimensions of Meaningful Connectivity

- Getting the Right Speed: 1.62%
- Having an Appropriate Device: 27.91%
- Connecting with Enough Data: N/A
- Using the Internet Regularly: N/A

A meaningful connectivity to the internet implies having access to an appropriate device, enough data and speeds, and using the internet every day. Less than 2% of people in Afghanistan have access to 4G compatible speeds, and only 27.91% have access to smartphones, which are considered to be appropriate devices.

Investments needed by 2030

TOTAL INVESTMENT = USD4.7 bn

- ICT skills and content = USD0.5 bn
- Policy and regulation = USD0.1 bn
- Remote area coverage = USD0.7 bn
- Network operation and maintenance = USD0.6 bn
- Metro and backbone fibre = USD0.6 bn
- Mobile infrastructure CAPEX = USD2 bn

Universal access is defined based on 90% of the population of 10 years and above.

Afghanistan does not meet the affordability target established by the United Nations Broadband Commission, as 1GB corresponds to 5.46% of the monthly average income in the country. 5GB of fixed broadband is at 15.20%, while 5G of mobile broadband represents 10.31% of the monthly average income. Smartphone affordability is at 3.46% of monthly income. The country ranks 60th (out of 72 countries surveyed) on A4AI’s Affordability Drivers Index, (ADI).
Infrastructure sharing

The policy and regulatory framework is relatively new and somewhat advanced in regards to some areas, such as, infrastructure sharing. However, implementation is a concern.

Universal and public access

Until recently, broadband infrastructure was not among the uses of the Telecom Development Fund (TDF). There were some changes to this scenario over the past years, indicating positive developments.

Regulatory environment

The Telecom Law establishes that issuance of licenses shall be conducted through a bidding process. While this has not been practiced in the past, there is an expectation that competitive processes will start being implemented.

Infrastructure sharing

The policy and regulatory framework is relatively new and somewhat advanced in regards to some areas, such as, infrastructure sharing. Implementation is a concern.

Universal and public access

Until recently, broadband infrastructure was not among the uses of the Telecom Development Fund (TDF). There were some changes to this scenario over the past years, indicating positive developments.

Regulatory environment

There is an outdated licensing framework, with little flexibility as far as uses of new technologies, convergence, and spectrum management. Institutional capacity remains a concern and must be addressed.

Broadband Strategy

No Broadband Plan or strategy has been adopted to this date. A policy draft is being developed, but it has not formally been adopted yet.

Universal and public access

Despite some recent legal and regulatory changes, the Telecom Development Fund (TDF) is mostly used towards voice only, not broadband access. This and other issues represent barriers to properly implementing universal access actions.

As shown in the figures, 80% of the population in Afghanistan lives in areas which simply have no coverage, and 19.3% are covered but not connected. Analysis conducted by A4AI to estimate the investments needed to connect the population of Afghanistan to the internet by 2030, shows that almost half of the total investments relate to mobile infrastructure capital expenditure (CapEx), which implies that infrastructure deployment is still one of the most pressing issues in the country. Nonetheless, costs are also associated with fiber deployment, network operation and maintenance, remote area coverage, as well as costs associated with building necessary ICT skills and relevant content. Costs associated with policy and regulatory upgrades are also important but are less representative.

THE ADI
AFFORDABILITY DRIVERS INDEX

The ADI is a tool developed by A4AI to assess how well a country’s policy, regulatory, and overall supply-side environment is positioned to lower industry costs and ultimately create more affordable broadband. ADI scores countries across two main policy groups: Infrastructure and Access.

Policy Scores

<table>
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<tr>
<th>Policy Area</th>
<th>2020 Score</th>
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<tr>
<td>Regulatory Environment</td>
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<td>Universal &amp; Public Access</td>
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2020 Affordability Drivers Index (ADI)

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Source: A4AI, 2020